



**Finance and Operations
Business Partner
Job Application Pack
January 2019**

Welcome to the Elliot Foundation

Welcome from the CEO



The Elliot Foundation is a successful, charitable multi-academy trust specialising in primary academies. We are building a thriving community of schools including converter and sponsored primary academies that succeed on behalf of their children. We bring an understanding of the unique role of successful primary education as a prerequisite for even greater success at secondary school level.

We aim to maintain a group of exceptional primary academies that is uncompromising in its search for excellence and in its commitment to searching for and sharing emerging best practice across its primary academy chain.

You are an amazing person, why not work somewhere you can make a real difference?

The simple fact that you are still reading this makes you one of the good guys. On behalf of the 11,000 children currently in Elliot Foundation schools and those children yet to be born, thank you. Without people like you, there would be no future for our society or our world. Primary teaching builds the foundation for successful lives and communities are shaped at the gates of primary schools. You can play a pivotal role in growing a multi academy trust which supports schools to develop not just children's skill sets but their lifelong attitudes to learning and even their moral compass.

What makes the Elliot Foundation tick?

Most pedagogues agree on what it takes to build a learner. You need a safe space, some rules and to raise expectations of success. The idea behind the Elliot Foundation is to treat teachers and schools the same way we want them to treat children. We aim to create a thriving and diverse family of schools all committed to improving outcomes for all children. From our modest beginnings in 2012, we currently have 28 schools in three thriving clusters in the West Midlands, London and East Anglia.

- Children arrive at Elliot Foundation schools between two terms and a year behind where they should be at the age of four
- By the time they leave our schools they have caught up with the national average
- Elliot Foundation schools are at least three times more deprived and challenged than average and yet our schools are three times more likely to be judged outstanding by OFSTED than the national average.



Why join us?

From the moment you join the Elliot Foundation you become part of a family. We know that there are no magic wands in the education sector. There is only the perpetual commitment to being better. So members of the Elliot Foundation are not alone. You will immediately become part of a team sharing varied and innovative approaches to their work and supporting one another.

A career in the Elliot Foundation is full of opportunity. We pride ourselves on offering a variety of comprehensive learning and developmental opportunities for our team and we are continuously looking at new ways to support staff at all levels. To date, these have come through partnerships with Universities, internal development courses, mentoring and shadowing.

Every year we ask all Principals of academies who form part of the Elliot Foundation whether they would join the Foundation again and I am delighted to tell you that 100% of them would. The Elliot Foundation is committed to helping children and teachers and schools succeed whatever their background. Come and help us write a better story.

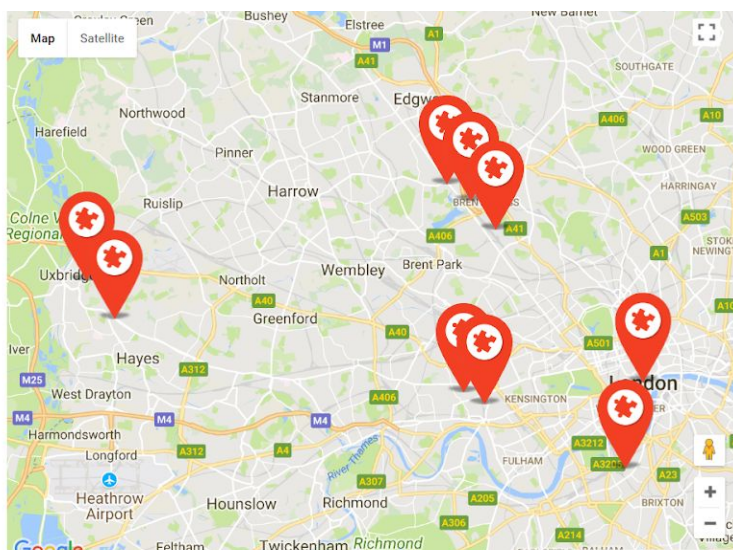
Hugh Greenway, Chief Executive Officer



About the Elliot Foundation Academies Trust

TEFAT Academies and Clusters

The Elliot Foundation currently has 28 schools in three thriving clusters of primary academies in the West Midlands, London and East Anglia.

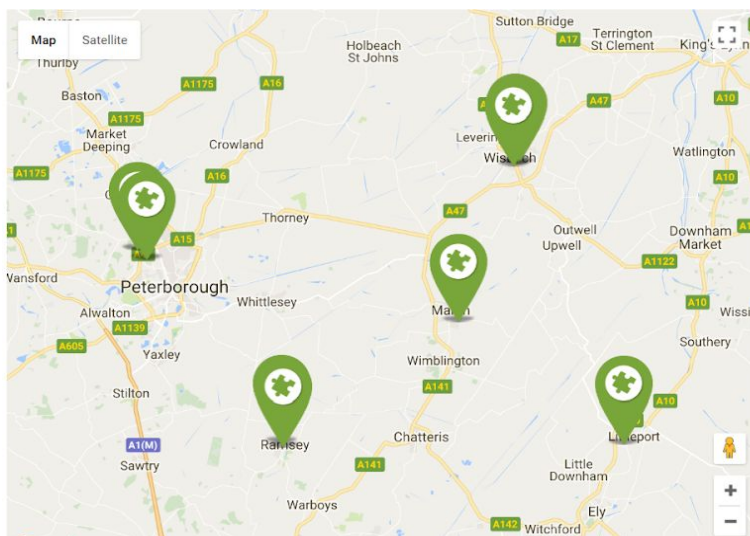


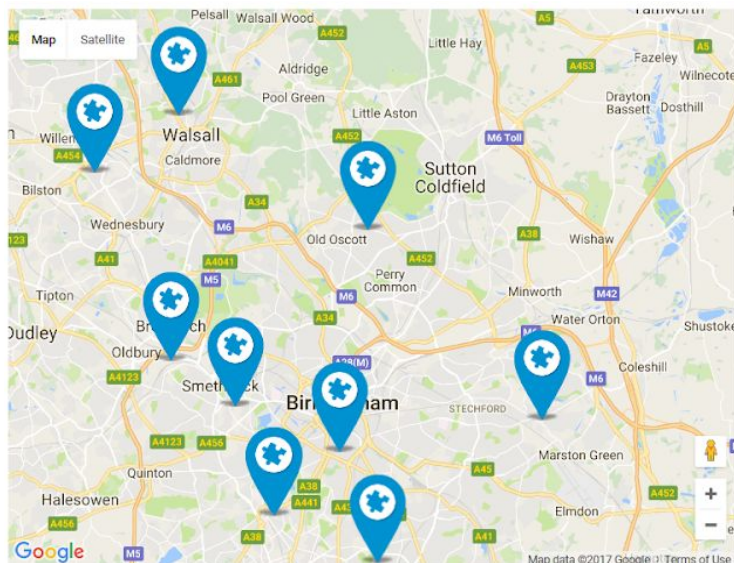
West Midlands

-  Billesley Primary School
-  Chandos Primary School
-  Croft Academy
-  George Betts Primary Academy
-  Kings Rise Academy
-  Rough Hay
-  Shirestone Academy
-  Shireland Hall Primary Academy
-  Tiverton Academy










London

-  Claremont Primary School
-  Greenside Primary School
-  Griffin Primary School
-  Hillingdon Primary School
-  The Hyde School
-  John Locke Academy
-  Lena Gardens Primary School
-  Parkfield Primary School
-  Pinkwell Primary School





East Anglia

-  Cavalry Primary School
-  Elm Road Primary School
-  Eyrescroft Primary School
-  Highlees Primary School
-  Millfield Primary School
-  Nene Infant and Nursery School
-  Ramnoth Junior School
-  Ramsey Junior School
-  Ramsey Spinning Infant School

Future Growth

We are delighted to be welcoming a number of new schools to the Trust over the coming months which may include the creation of a fourth regional cluster in Northamptonshire.



Vision, values and goals



Vision

The Elliot Foundation was created as a safe place for children and teachers where all are nurtured to achieve beyond even their own expectations.

Our motto, “Where children believe they can because teachers know they can” reflects our conviction that raising expectations for all children and teachers is at the heart of a successful and inclusive society.

Values

- **FOR CHILDREN:** We help children to discover themselves and aspire beyond any limitations that their context might appear to place upon them. We help them understand that they can be, ‘heroes of their own lives’ building the foundations for healthy and successful lives
- **FOR SCHOOLS:** In addition to the essential functional skills of reading, writing and mathematics, children need to learn how to learn and to believe that they can continue to do so. They must also possess the critical thinking skills to sift fact from fiction to be able to think for themselves, freely and creatively.
- **FOR SUCCESS:** To thrive, whatever their chosen path, children need confidence, curiosity and commitment. We will nurture these attitudes across all their learning experiences.
- **FOR COMMUNITIES:** ‘No man is an island’, children at Elliot schools will be raised with an awareness of the world around them and their role in shaping a better future through volunteering and contributing in their communities.



Goals

- Good is a given – all our children will receive an education that is deemed ‘Good’ or better. All of our schools will be judged ‘Good’ by OFSTED at their first inspection following joining the trust regardless of their starting point or context
- Context is a challenge not an excuse – the Elliot Foundation will achieve above national average for Key Stage 2 outcomes regardless of the deprivation of the communities that we serve
- Primary education should prepare children for life and learning and its success will be measured by the contributions of our children to society not just their performance in tests

Why specialising in primary schools?

We believe there is an urgent need to inject choice into the present converter and sponsor academy arrangements for primary schools and for a partner that understands and focuses exclusively on the unique role of primary education in improving the life chances of all children.

Why minimal intervention?

We demand high performance from our primary academy schools but we recognise that each school's individual journey to success will differ based on its context. Consequently, we encourage diversity of approach and allow local governing bodies the freedom to manage in the best interests of their community unless schools are failing their children.

What services are offered to schools in the Elliot Foundation?

Together with our strategic partners we offer a comprehensive suite of education and business services to our academies including: school improvement, professional and leadership development, finance, HR and payroll, legal, insurance, IT and MIS support, facilities and best practice primary academy estates management.

Our services are led by experienced professionals in their fields and alongside their teams, they offer expert advice and guidance, practical support and a monitoring and review remit to ensure compliance.

Educational Support

Each academy is assigned a Regional Director who provides support, challenge and strategic guidance to build school improvement and secure the Trust's aims of strong and successful outcomes for children.

Each Regional Director works closely with a number of schools in a cluster and this model facilitates our expectation that all of our schools actively support each other and share emergent and best practice for everyone's benefit.

Governance and Policy

The Director of Governance and Policy provides leadership and support to our academies in relation to governance, policy, admissions and other statutory arrangements. We provide challenge and support to local governors and trustees, monitor effectiveness and ensure the structure and practice of governance and policy throughout the Trust continuously improves.

Finance Team

The Finance Team at The Elliot Foundation is led by the Finance Director and consists of accountants based in Head Office who work with those within the academies who have responsibility for finance matters, namely the Principals and finance managers. We are looking to increase the responsiveness of this team by adding roles in the West Midlands and East Anglia.

The primary aims of the Finance Team include: safeguarding the assets of The Elliot Foundation to ensure that they are applied in the manner in which intended; and to work on The Elliot Foundation future development and strategy.

The finance function work can be viewed through two lens: (1) The Past and (2) The Future.

The Past is covered through

- the day to day accounting in relation to all transactions going on within The Trust
- Financial reporting and control
- Dealing with any taxation matters (e.g. VAT)
- Compliance with legal and regulatory reporting - companies act, charities act and department of education requirements

The Future is covered through

- Strategic planning
- Financial planning (budget, forecasts and medium term plans) and analysis
- Treasury and cash flow management
- Capital budgeting
- Risk management

HR Team

The HR Team is a small team led by the HR Director to provide comprehensive support on all HR matters to both the central head office and academies within the Trust. A third party provider is used to support schools on operational HR matters whilst the more complex and strategic work is undertaken by the central HR Team themselves.

Each academy is assigned a named HR professional from the team to work closely alongside, ensuring that we understand the context and needs of our schools and that the advice and support provided is tailored appropriately.

Estates Management

The Estates Director provides strategic leadership and support to academies on all matters relating to buildings and estates management and health and safety compliance. This specialist support ensures capital strategy, asset management and project management are effective, legally compliant and best meet the needs of the academies.

Our Golden Rules

The Elliot Foundation is built on positivity. We believe that given a chance people will perform. There is no set 'type', but there are a few norms that we expect you to be aware of:

Show up

We are not a clock-watching organisation. Please don't make us become one. We trust you to put in the hours you are paid to work. We are a charity funded from the public purse. We need to be smarter, faster and more resilient simply to survive.

Be nice wherever and whenever possible

It costs you nothing. When answering the phone announce your name, the organisation's name and some form of greeting. Try to smile when on the phone. It makes you sound more approachable.

Be creative

Don't do something just because you have been told to. If you can see a better way, suggest it. And don't give up if your first idea isn't implemented.

Make work fun

We know it can sometimes be tedious.

Respect your colleagues

People are allowed to be different, as are you!

Trust each other

Trust is earned but start from a position of optimism rather than skepticism.

Keep going

There will be difficult days. When stuff happens and everyone around you seems to be on a different wavelength. Just keep going.

Be a team player... and manage your manager

We are all part of the same gang. If one part fails, we all fail.

Think before you communicate

Think first, talk second, write last. Pick up non-verbal clues, how is the other person feeling? Have they understood? If you have to email, follow TEFAT email protocol

Forgive yourself and others

At least twice a day. We all make mistakes. Admit them and move on. Everyone deserves a chance.

Be prepared to change

If you can do most of the above, you will be part of the solution and not part of the problem. None of us wants to be part of the problem.

Finance and Operations Business Partner - Further Details

The Finance Team

The Finance Team is comprised as follows:



Finance Director

The Finance Director provides strategic leadership to the finance team and function across the Trust. The Finance Director is responsible for the financial health of The Trust, plus that reporting is carried out in an accurate and timely manner.

Academy Finance Accountants

The two Academy Finance Accountants each support an allocated group of academies based in London on financial matters and oversee the financial submissions of those schools. They work with the schools in relation to budgets, forecasts and variance analysis. They also provide support for reporting and year-end financial work and day to day Head Office finance functions.

Finance and Operations Business Partners

The two Finance Business Partners will support an allocated group of academies in the East Anglia and West Midlands regions. They will deliver financial management responsibilities for those schools and provide support and guidance on financial matters to the leaders and finance staff based in the schools. They will also provide support for Head Office staff in other operational areas, such as Estates, HR and governance in regard to projects and issues in their regions.

Assistant Accountant

The Assistant Accountant provides support to the team through managing the HO finances plus other transactional work, as well as supporting all colleagues with a variety of tasks as needed.

The Vacancies

We are looking for two energetic and driven Finance and Operations Business Partners to work alongside a designated group of our primary schools to support and monitor their financial and operations activities. One role will be based in East Anglia to support the schools in the Cambridgeshire and Peterborough area and the other will be based in the West Midlands to support the schools in that cluster.

Based in one of the schools in their region, but with regular contact back to Head Office in London, the successful candidates will ideally be either a qualified or part qualified accountant with the ability to work with a variety of stakeholders and deliver financial management responsibilities including budget work, forecasts, variance analysis, day to day accounting and reporting. The Finance and Operations Business Partners will provide an invaluable link between Head Office and academies across wider operational matters. They will support other TEFAT Directors with projects and issues in the region.

The Finance and Operations Business Partners will also travel regularly to the schools in their region to provide direct support and advice on budgeting, forecasting, reporting and other finance related matters. This on site presence will afford the postholders an opportunity to get to know the schools and the senior staff and understand the context they work in, whilst establishing the role of the Finance and Operations Business Partner as an integral part of those schools. The Finance and Operations Business Partners will be valued professional partners to schools in an environment where budgets are getting harder to manage.

This role offers the opportunity to join the Trust at an incredibly exciting stage of its growth and be part of that journey. More importantly, it provides the post holder with the opportunity to fulfil a role which serves a truly meaningful purpose in improving the education and life chances of the children and young people in The Elliot Foundation Academy Trust's communities.

We can offer the opportunity to work alongside highly experienced colleagues within a supportive framework, providing opportunities for professional development and growth. No two working days will be the same and hard work goes alongside a sense of fun and comradeship amongst the central team.

Safeguarding Children and Young People

The Elliot Foundation Academies Trust is committed to safeguarding and promoting the welfare of children and young people. All staff and volunteers are therefore expected to behave in such a way that supports this commitment. Appointment to this post will be subject to the following satisfactory pre-employment checks:

- Right to work in the UK
- Health
- Identity
- Relevant work qualifications
- Barred List Check (previously List 99)
- Disclosure & Barring Service Check (for all staff and volunteers)
- References
- S128 Check (*where relevant*)
- Childcare Disqualification Declaration Check

How to apply

We hope that the information provided is useful and informative. If you wish to arrange an informal discussion in relation to the Trust and/or the specific role, please do not hesitate to contact Simon Pink, Finance Director via email at simon.pink@elliottfoundation.co.uk.

Please forward a copy of your CV along with a brief covering letter and confirming if you wish to apply for the East Anglia role or the West Midlands role. Please send your CV and covering letter to Craig McNamara, HR Business Partner either via email at craig.mcnamara@elliottfoundation.co.uk or by hard copy to:

The Elliot Foundation Academies Trust
Pyramid House
252B Gray's Inn Road
London
WC1X 8JT

Closing Date: 9am Monday 04 February 2019

Interview Date: Week commencing 11 February 2019

Job Description

POST TITLE:	Finance and Operations Business Partner
RESPONSIBLE TO:	Finance Director (plus other TEFAT Directors as appropriate)
DIRECT REPORTS:	None
INDIRECT REPORTS:	None

Purpose of the Role

- Ensure robust and effective financial administration of schools within The Elliot Foundation Academies Trust (TEFAT)
- Provide professional financial leadership and support to the academies within the Trust
- Support all operations functions within the region as required.

General Responsibilities

- Be familiar with and support the Trust's Vision, Values and Goals;
- Be aware of and comply with relevant policies and procedures, including those relating to safeguarding, health and safety, confidentiality and data protection;
- Embrace and celebrate diversity, ensuring equal opportunities for all;
- Contribute to the overall aims of the Trust;
- Behave in a professional manner at all times demonstrating mutual respect, good manners, politeness and common courtesies for all members of our community. We expect employees to behave in a manner that role models positive behaviours for our students;
- Ensure own continuous professional development, seeking active opportunities for innovative and effective practice; and
- Undertake any other duties/responsibilities which may reasonably be regarded as within the grade of the post as defined.

Specific Responsibilities

- Support School Business Managers (SBMs) and Finance Managers in building annual budgets and 3 yearly plans, as well as ongoing budget monitoring and forecasting
- Provide input to the FD so that the monthly management reports can be prepared
- Work with the HO Finance Team, Principals, SBMs and Finance Managers to improve efficiencies and reporting within the schools and across the Trust.
- Work with Principals, SBMs, Finance Managers and operations staff to ensure that the financial aspects of their decisions are fully understood and explored.
- Support school business managers/finance managers and other school staff in day to day accounting and the month end financial procedures including;
 - ❖ checking of or performing monthly bank reconciliations
 - ❖ reconciliation of nominal and intercompany/intercost centre balances for academy accounts

- ❖ reviewing posting of income and expenditure transactions and correct or adjust as required
- Provide support and training on PS Financials along with acting as the first line of support for PS Financials
- Provide support and training on academy finance and operations to key stakeholders
- Maintain good relations with the school business managers/finance managers/ operations leads at academies and provide, when required, day to day support
- In conjunction with the Finance Director and other AFA's, undertake reviews of the quality of financial administration in academies
- In conjunction with the Finance Director and other AFA's, provide input in order that the Elliot Foundation Academies Trust (TEFAT) finance manual and handbook can be kept up to date
- Assist the Finance Director in preparing and submitting financial returns to the DfE, ESFA and other relevant bodies
- Support the Finance Director and AFAs in producing TEFAT final accounts and provide any input required by TEFAT's external auditors
- Assist the FD in preparing and submitting financial returns to the DfE and ESFA and other relevant organisations
- Undertake as directed any other tasks relevant to the post holders responsibilities and the tasks described above

Operations

- Support the Estates Director with any projects in the region.
- Support the Programme Director with due diligence on possible new academies in the region.
- Assist the Programme Director and Finance Director with any procurement/tender processes in the region.
- Assist the HR Director and HR team with any issues which require local support.

Key Performance indicators

- Meeting month end deadlines
- Fully considered and robust budgets submitted on time to TEFAT
- Returns to ESFA delivered accurately and on time
- Accounts submitted on deadline with clean audit
- Successful completion of assigned projects
- Successful feedback from key stakeholders including and not limited to Principals, SBM's, Finance Managers, TEFAT Directors
- Successful meeting all of the relevant job description requirements

Key Relationships (Internal and External)

- Director of Finance, Director of Estates, Programme Director, HR Director and other members of the head office Finance Team and wider central office staff
- School based staff including Principals, SBMs and Finance Managers
- Regulatory and external bodies including DfE, ESFA and local authorities

Notes

- This role profile is non-contractual and provided for guidance. It will be updated and amended from time to time in accordance with the changing needs of TEFAT. The duties of this post may vary from time to time without changing the general character of the post or level of responsibility entailed;
- The responsibilities are subject to the general duties and responsibilities contained in the Statement of Conditions of Employment; and
- Recruitment and induction practices to safeguard and promote the welfare of children and/or vulnerable adults apply to this post in addition to the requirement to obtain a Barred list and enhanced Disclosure and Barring Service (DBS) check.

Person Specification - Finance and Operations Business Partner

	Essential	Desirable
Education and Qualifications		
Educated to degree level or equivalent	X	
Qualified accountant, or part qualified working towards full qualification (ACA, ACMA, ACCA or comparable)		X
Knowledge and Experience		
Significant experience of working in a finance role	X	
Experience of operating as a high level user of mid-range accountancy systems	X	
Experience of managing projects and leading on organisational change		X
Experience of managing operational functions apart from finance.		X
Ability to understand, interpret and clearly communicate financial performance and concepts to colleagues and stakeholders with varying levels of financial understanding	X	
Sound knowledge of financial reporting standards	X	
Professional Skills		
Excellent accounting and bookkeeping skills	X	
Proven ability to work in an organised and methodical manner	X	
Ability to make sound judgements and prioritise conflicting demands ensuring deadlines are met	X	
Excellent interpersonal skills with the ability to manage various stakeholders effectively	X	
Excellent written and oral communication skills	X	
Good IT skills (Word, Excel, use of databases etc)	X	
Personal Qualities		
Self motivated, with a 'can do' approach to problem solving and the ability to work under own initiative	X	
Flexible, mature and balanced approach	X	
Reliable, enthusiastic and committed	X	

Person Specification - Finance and Operations Business Partner (continued)		
	Essential	Desirable
Ability to learn quickly and effectively	X	
Strong value of teamwork with the ability to support and contribute to the ethos of TEFAT	X	